



Colorado.gov

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**Customer Administrator Account Management**

**User Manual**

*Version 2.0*

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## Overview

### 1.1 WELCOME

Welcome Customer Administrator. This manual will show you how to manage your account with Colorado Interactive including changing account information, billing information and managing your users. This information is also available on our Registered Services site. All account management is done through our Customer Database. (CDB)

Access Registered Services Page:

<http://www.colorado.gov/registration/>

Log into Customer Data Base (CDB):

<https://cmbs-admin.soltn.cdc.nicusa.com/co/cust-admin/login.html>

### 1.2 CUSTOMER SUPPORT

#### Phone

303-534-3468

Toll free: 800-970-3468

(Available Monday – Friday, 8:00 am – 5:00 pm)

#### Email

support@www.colorado.gov

#### Mail

Colorado Interactive

600 17<sup>th</sup> Street, Suite 2150 South

Denver, CO 80202

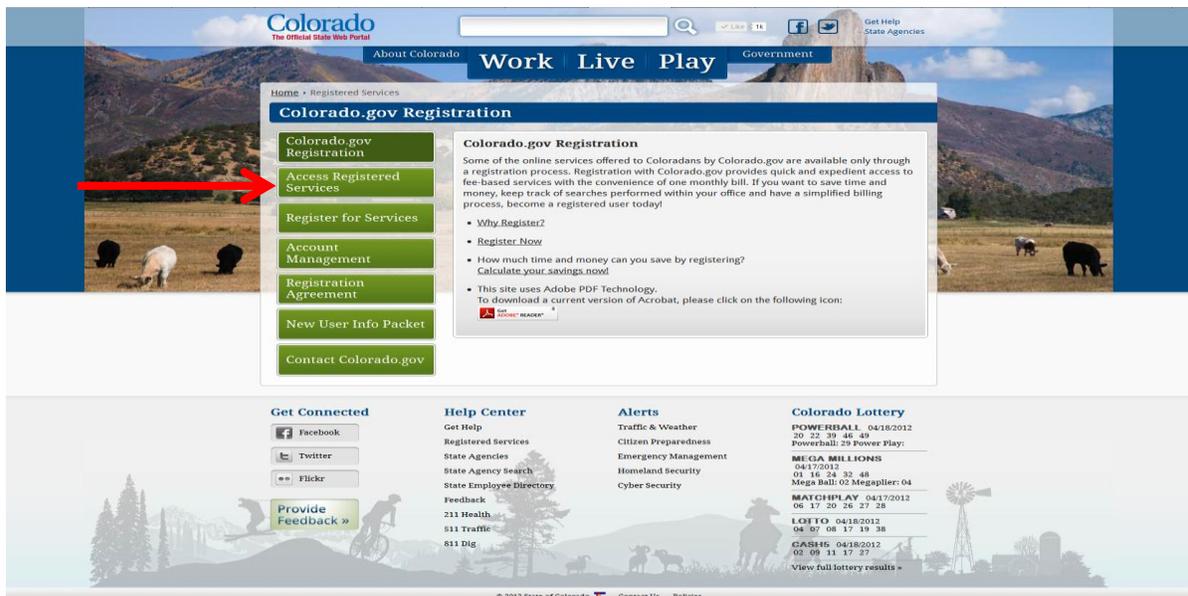
## 2 Adding a User

This function allows the Customer Administrator to add a new user at anytime. The Customer Admin will issue a username and password to the new user. At that point the Customer Administrator will fax the activation form Colorado Interactive to activate that user.

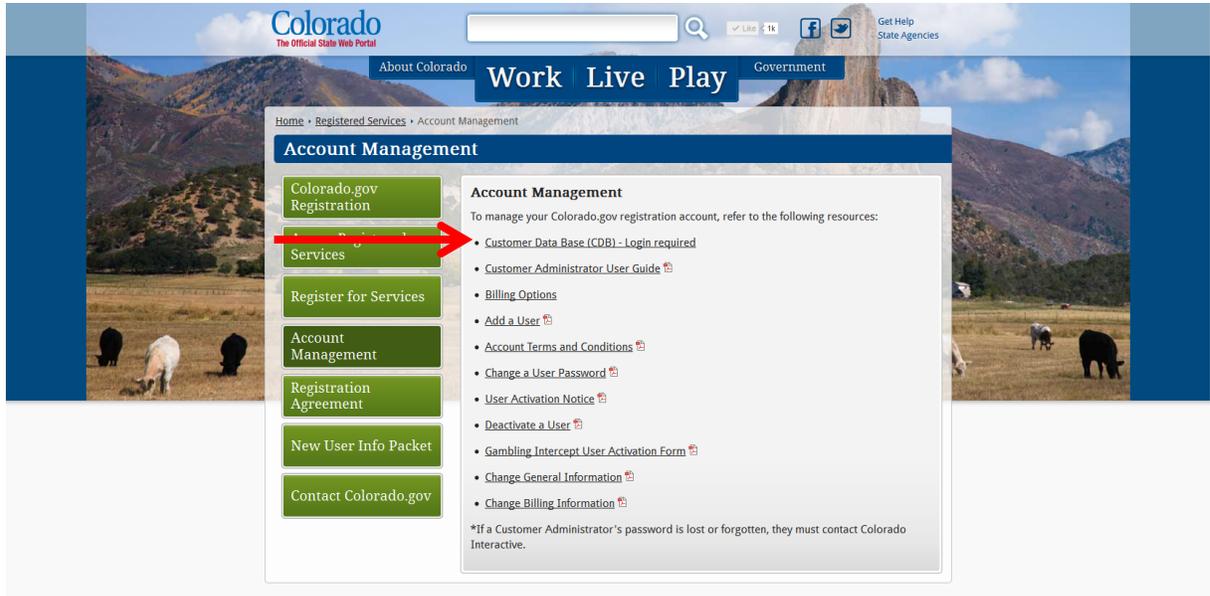
### 2.1.1 Colorado.gov Homepage-Access the Registered Services page



### 2.1.2 Registered Services Page-Access Account Management page



### 2.1.3 Registered Services Page-Access Customer Data Base (CDB)



### 2.1.4 Log into CDB (Customer Data Base)-Enter username and password



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Login to Your CDB Account

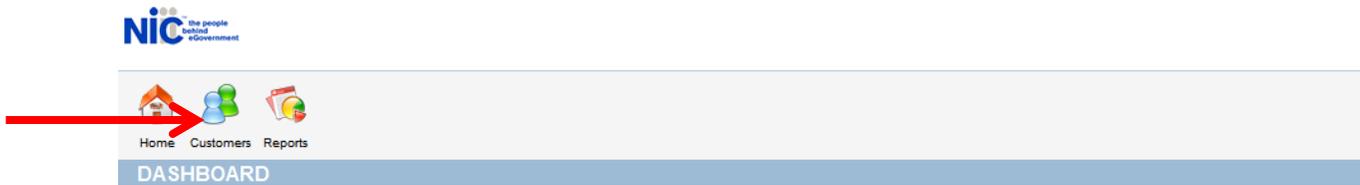
Login:

Password:

[Forgot my password](#)

Login

### 2.1.5 Select Customer



### 2.1.6 Select Users

**CUSTOMER SUMMARY**  
Home > Customers > Customer Summary

**Customer Information**

Customer Name:	ABC Company	Customer Number:	100361
Contact Name:	Smith John	Phone:	123-456-
Contact Email:	<a href="mailto:johnsmith@abccompany.com">johnsmith@abccompany.com</a>	Secondary Phone:	
Status Code:	Active	Fax:	
Date Activated:	08/27/2009	Customer Address:	123 Main Denver, C USA
NIC Customer;		Secondary NAICS Code:	
Status Changed;	08/27/2009		
Primary NAICS Code:			

**Aging Information**

Balance	0-30 Days	31-60 Days	61-90 Days

**Address Information**

Address 1:	123 Main St
Address 2:	
City:	Denver
State/Province:	Colorado
Postal Code:	80202
Country:	USA

**Phone Information**

Phone:	123-456-7890
Secondary Phone:	
Fax:	
Mobile:	

### 2.1.7 Select Add User

**USERS**  
Home > Customers > Customer Summary > Users

**Customer Information**

Customer Name:	ABC Company	Customer Number:	100361
----------------	-------------	------------------	--------

Total records: 2 page 1 of 1

Login	Name	Login Type	Email	Phone	Status	
<a href="#">jdoe</a>	Jane Doe	User			Inactive	<input type="button" value="New Password"/>
<a href="#">jsmith</a>	John Smith	Customer Admin	<a href="mailto:johnsmith@abccompany.com">johnsmith@abccompany.com</a>		Active	<input type="button" value="New Password"/>

First | Previous | Next | Last

### 2.1.8 User Details

Please fill in user information and choose Submit.

The screenshot shows the 'ADD USER' form in the Customer Administrator Account Management 2.0 system. The form is divided into several sections:

- Customer Information:** Customer Name: ABC Company, Customer Number: 100361
- Add User:**
  - ID: [ ]
  - Login: \* [ ] (Login should be at least 4 alphanumeric characters.)
  - Password: \* [ ] (Password should be at least 5 alphanumeric characters. Current strength requires at least one letter be upper case and one lower case.) [Generate]
  - First Name: [ ]
  - Last Name: [ ]
  - Email: [ ]
  - Status: \* Active [ ]
- Address Information:** Address 1: \* [ ], Address 2: [ ], City: \* [ ], State/Province: \* Colorado [ ], Postal Code: \* [ ], Country: USA [ ]
- Phone Information:** Main: \* [ ], Secondary Phone: [ ], Fax: [ ], Mobile: [ ], Pager: [ ], Alternate Number 1: [ ] Description: [ ], Alternate Number 2: [ ] Description: [ ]

A red arrow points to the **Submit** button at the bottom right of the form.

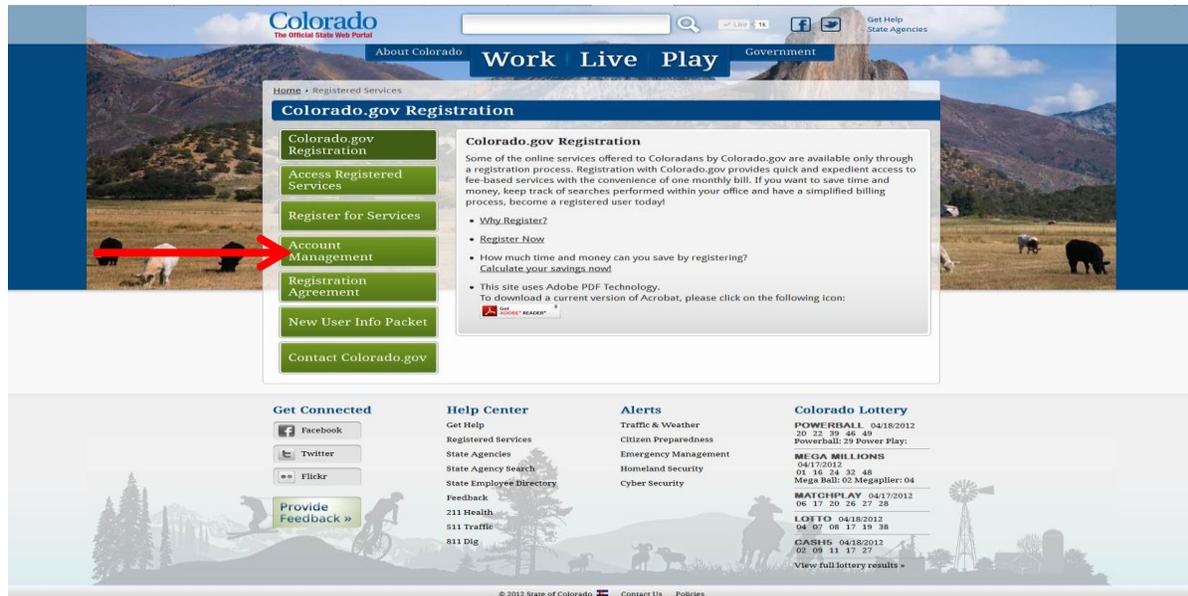
## 3 Deactivate User

This function allows the Customer Admin to deactivate any user at any time.

### 3.1.1 Colorado.gov Homepage-Access Registered Services page



### 3.1.2 Registered Services Page-Access Account Management Page



### 3.1.3 Log into CDB (Customer Data Base) –Enter your username and password



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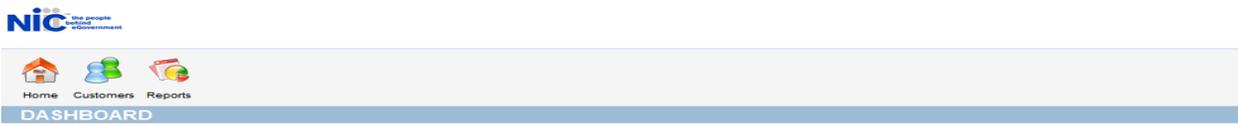
**Login to Your CDB Account**

Login:

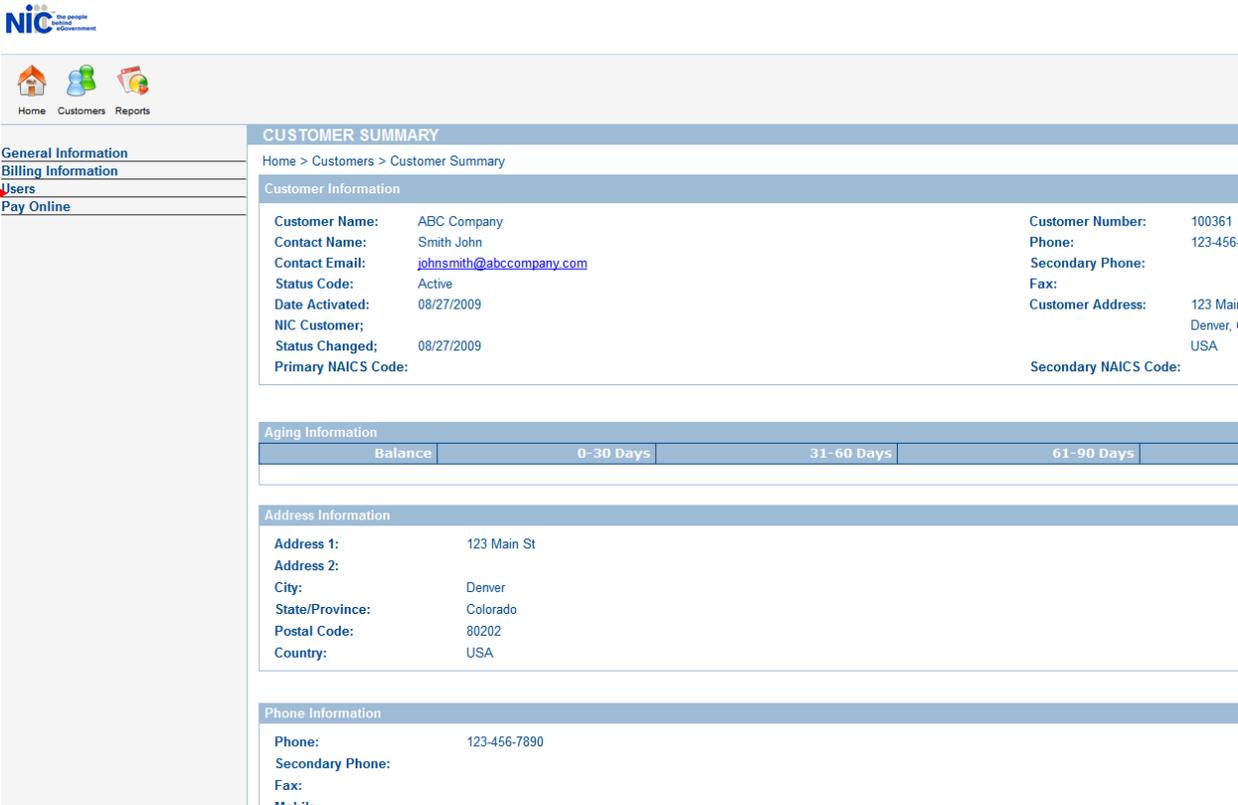
Password:

[Forgot my password](#)

### 3.1.4 Select Customer



### 3.1.5 Select Users



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Home Customers Reports

**CUSTOMER SUMMARY**

Home > Customers > Customer Summary

**Customer Information**

Customer Name:	ABC Company	Customer Number:	100361
Contact Name:	Smith John	Phone:	123-456-
Contact Email:	<a href="mailto:johnsmith@abccompany.com">johnsmith@abccompany.com</a>	Secondary Phone:	
Status Code:	Active	Fax:	
Date Activated:	08/27/2009	Customer Address:	123 Main
NIC Customer:			Denver, C
Status Changed:	08/27/2009		USA
Primary NAICS Code:		Secondary NAICS Code:	

**Aging Information**

Balance	0-30 Days	31-60 Days	61-90 Days

**Address Information**

Address 1:	123 Main St
Address 2:	
City:	Denver
State/Province:	Colorado
Postal Code:	80202
Country:	USA

**Phone Information**

Phone:	123-456-7890
Secondary Phone:	
Fax:	
Mobile:	

**General Information**

**Billing Information**

**Users**

**Pay Online**

### 3.1.6 User Deactivation

Find the user you wish to deactivate in user list and click on their 'Active' link once as shown below.

The screenshot shows the 'USERS' management page for a customer named 'ABC Company' (Customer Number: 100361). The page displays a table with 2 records. A red arrow points to the 'Active' link in the 'Status' column for the user 'John Smith'.

Login	Name	Login Type	Email	Phone	Status
<a href="#">jdoe</a>	Jane Doe	User			<a href="#">Active</a>
<a href="#">jsmith</a>	John Smith	Customer Admin	johnsmith@abccompany.com		<a href="#">Active</a>

The page will automatically refresh and display the user as 'Inactive'.

The screenshot shows the same 'USERS' management page after a refresh. The status for 'John Smith' has changed to 'Inactive', and a red arrow now points to the 'Inactive' link in the 'Status' column.

Login	Name	Login Type	Email	Phone	Status
<a href="#">jdoe</a>	Jane Doe	User			<a href="#">Inactive</a>
<a href="#">jsmith</a>	John Smith	Customer Admin	johnsmith@abccompany.com		<a href="#">Active</a>

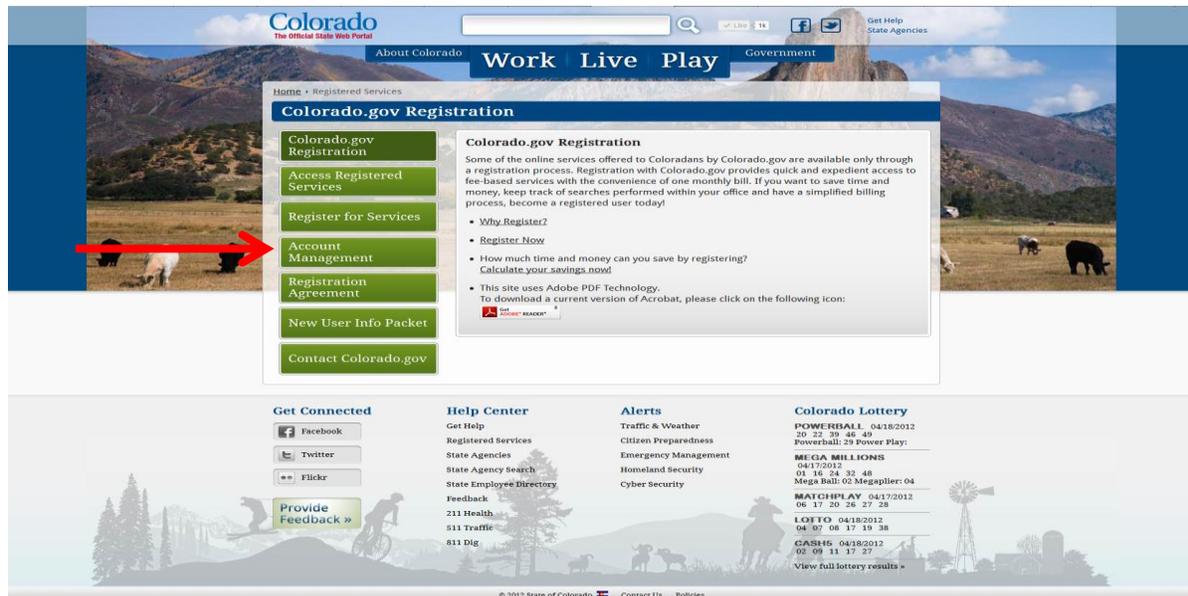
## 4 Change Password

This function allows the Customer Admin to change any user's password at anytime.

### 4.1.1 Colorado.gov Homepage-Access Registered Services page



### 4.1.2 Registered Services Page-Access Account Management Page



### 4.1.3 Log into CDB (Customer Data Base) –Enter your username and password



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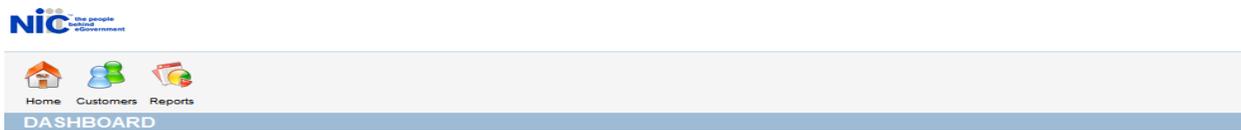
**Login to Your CDB Account**

Login:

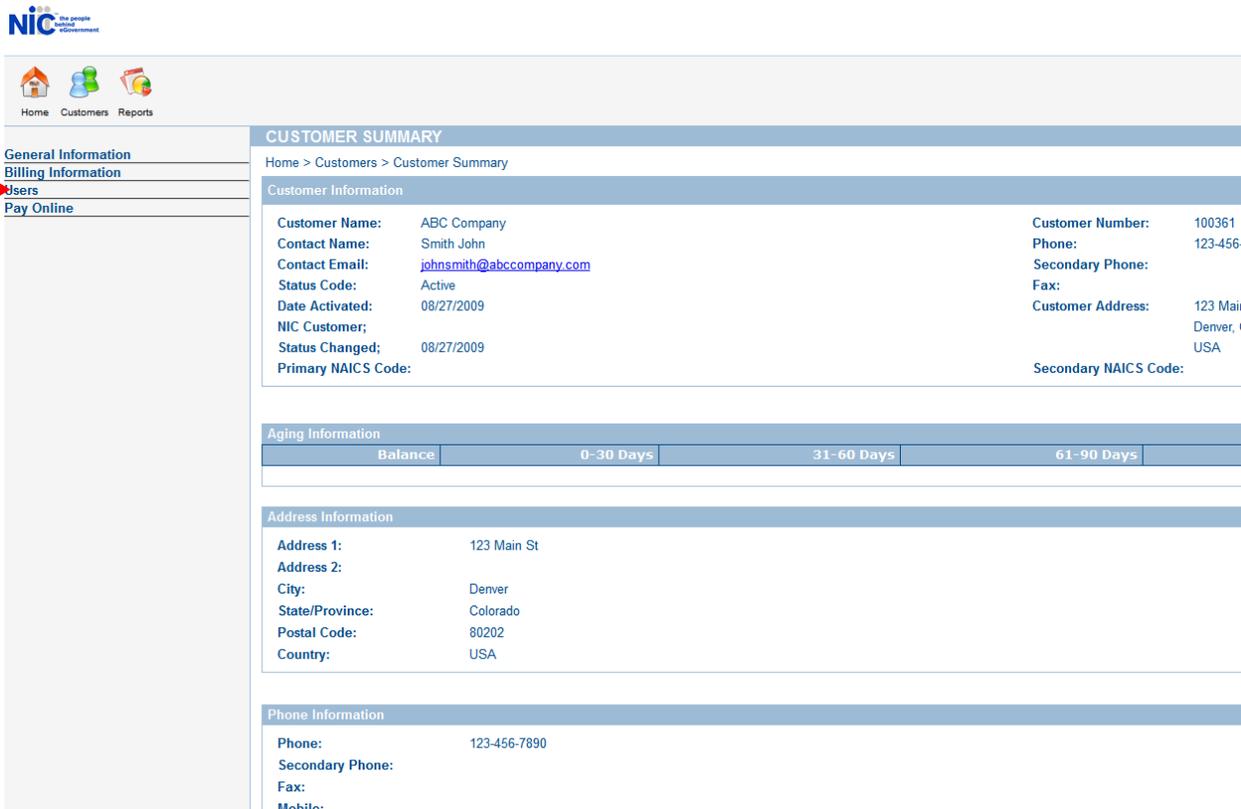
Password:

[Forgot my password](#)

### 4.1.4 Select Customer



### 4.1.5 Select Users



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Home Customers Reports

**CUSTOMER SUMMARY**

Home > Customers > Customer Summary

**Customer Information**

<b>Customer Name:</b>	ABC Company	<b>Customer Number:</b>	100361
<b>Contact Name:</b>	Smith John	<b>Phone:</b>	123-456-7890
<b>Contact Email:</b>	<a href="mailto:johnsmith@abccompany.com">johnsmith@abccompany.com</a>	<b>Secondary Phone:</b>	
<b>Status Code:</b>	Active	<b>Fax:</b>	
<b>Date Activated:</b>	08/27/2009	<b>Customer Address:</b>	123 Main Denver, C USA
<b>NIC Customer:</b>		<b>Secondary NAICS Code:</b>	
<b>Status Changed:</b>	08/27/2009		
<b>Primary NAICS Code:</b>			

**Aging Information**

Balance	0-30 Days	31-60 Days	61-90 Days

**Address Information**

<b>Address 1:</b>	123 Main St
<b>Address 2:</b>	
<b>City:</b>	Denver
<b>State/Province:</b>	Colorado
<b>Postal Code:</b>	80202
<b>Country:</b>	USA

**Phone Information**

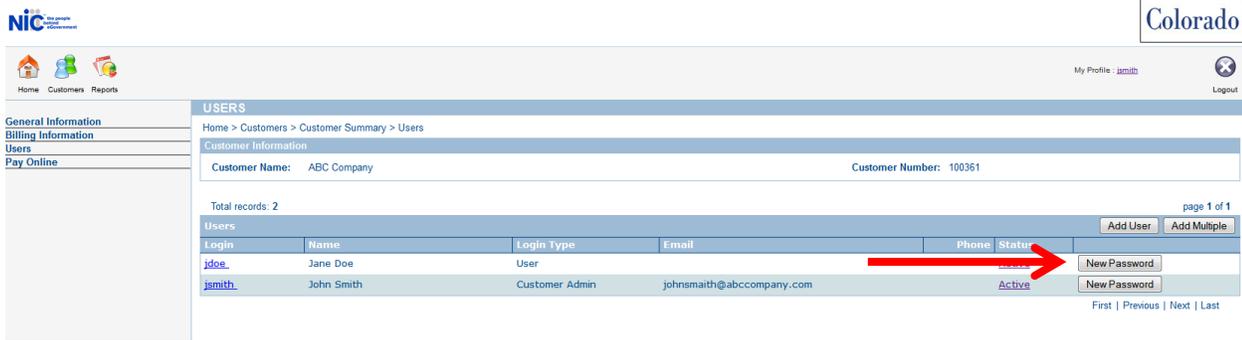
<b>Phone:</b>	123-456-7890
<b>Secondary Phone:</b>	
<b>Fax:</b>	
<b>Mobile:</b>	

**Navigation Menu:**

- General Information
- Billing Information
- Users
- Pay Online

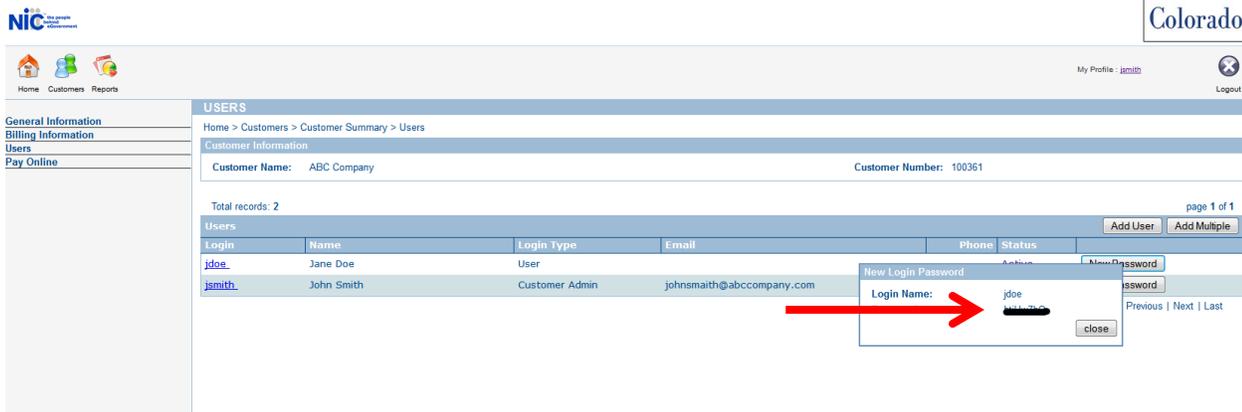
### 4.1.6 Changing Users Password

Locate the user from the list that you wish to reset the password for and click their 'New Password' link



### 4.1.7 Reset Password Confirmation

A window will open with a new password, note the password and close the window. Be advised that once you close that window you will no longer be able to see the password and will have to reset it again.



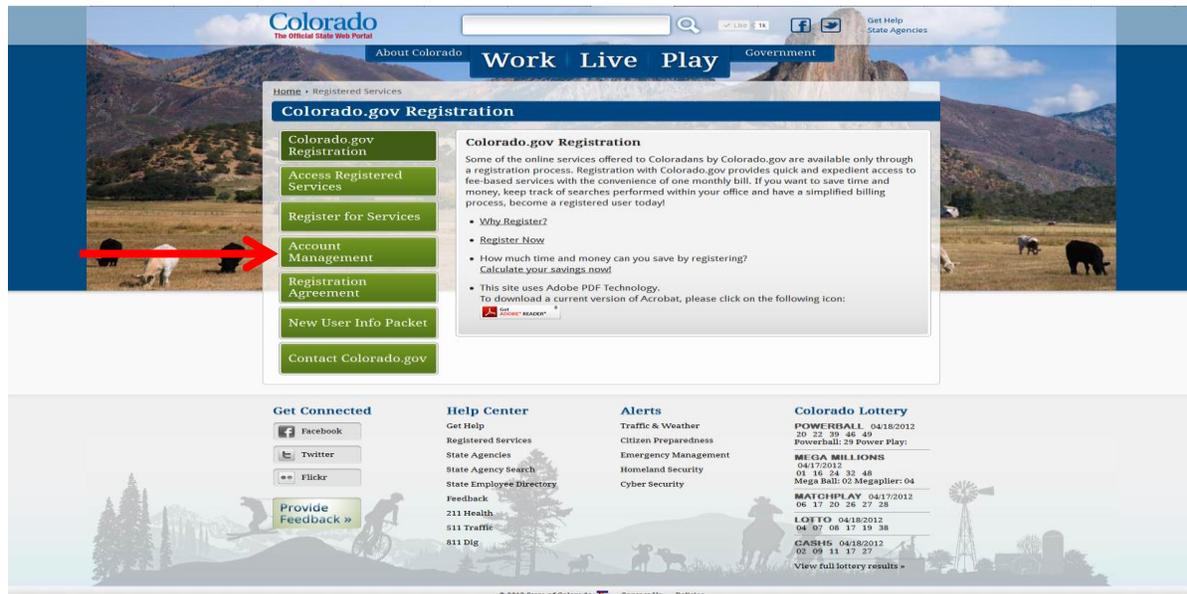
## 5 Change General Information

This function allows the Customer Admin to change the general information for the company such as contact information.

### 5.1.1 Colorado.gov Homepage-Access Registered Services page



### 5.1.2 Registered Services Page-Access Account Management Page



### 5.1.3 Log into CDB (Customer Data Base) –Enter your username and password

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**Login to Your CDB Account**

Login:

Password:

[Forgot my password](#)

### 5.1.4 Select Customer

Home Customers Reports

**DASHBOARD**

### 5.1.5 Choose Modify Customer

Colorado

Home Customers Reports

My Profile: [jsmith](#) Logout

**CUSTOMER SUMMARY**

Home > Customers > Customer Summary

Customer Information

Customer Name:	ABC Company	Customer Number:	100361
Contact Name:	Smith John	Phone:	123-456-7890
Contact Email:	<a href="mailto:johnsmith@abccompany.com">johnsmith@abccompany.com</a>	Secondary Phone:	
Status Code:	Active	Fax:	
Date Activated:	08/27/2009	Customer Address:	123 Main St Denver, CO 80202 USA
NIC Customer:		Secondary NAICS Code:	
Status Changed:	08/27/2009		
Primary NAICS Code:			

Aging Information

Balance	0-30 Days	31-60 Days	61-90 Days	91-120 Days	121+ Days

Address Information

Address 1:	123 Main St
Address 2:	
City:	Denver
State/Province:	Colorado
Postal Code:	80202
Country:	USA

The screen changes (as shown below) to allow user to make any desired changes. Once all changes have been made, please select the 'Submit' button at the bottom.

**MODIFY CUSTOMER**  
Home > Customers > Customer Summary > Modify Customer

**Customer Information**

Customer Name:\* ABC Company  
Customer ID: 100361  
Create Date: 08/27/2009  
NIC Customer:  
Status Code:\* Active  
First Name: John  
Last Name:\* Smith  
Email:\* johnsmith@abccompany.com  
Primary NAICS Code:\*   [Click to Modify NAICS Code](#)  
Secondary NAICS Code:   [Click to Modify NAICS Code](#)

The following section is optional, but if data is entered into this section the fields with an \* are required.

**Address Information**

Address 1:\* 123 Main St  
Address 2:  
City:\* Denver  
State/Province:\* Colorado  
County: -- County --  
Postal Code:\* 80202  
Country:\* USA

The following section is optional, but if data is entered into this section the fields with an \* are required.

**Phone Information**

Main:\* 123-456-7890  
Secondary Phone:  
Fax:  
Mobile:  
Pager:  
Alternate Number 1:  Description:   
Alternate Number 2:  Description:

**Submit**

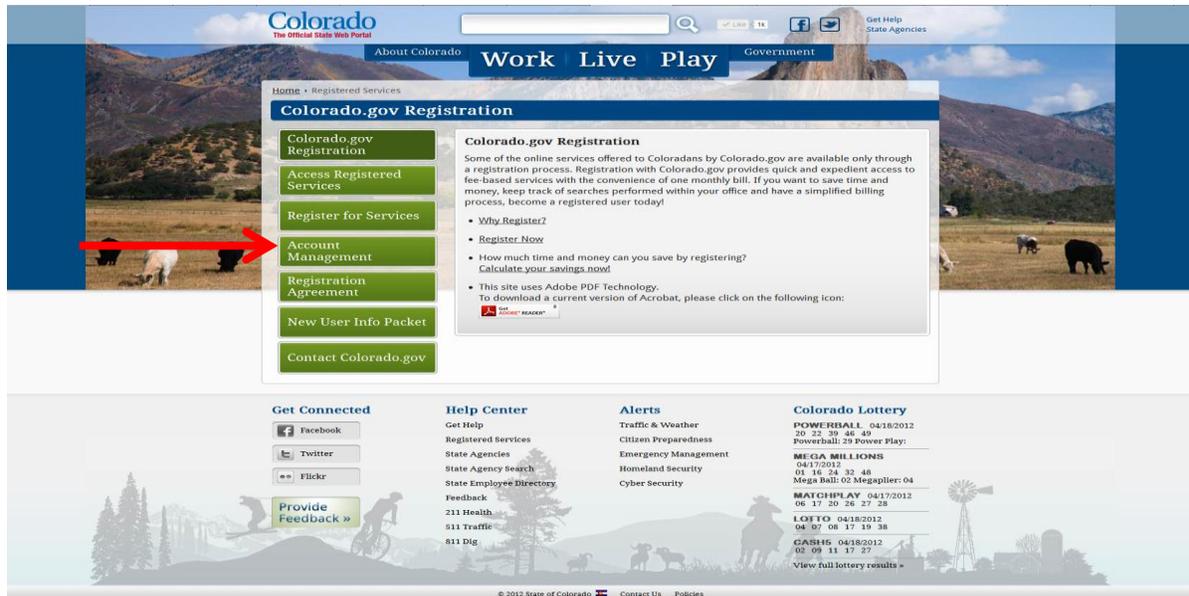
## 6 Change Billing Information

This function allows the Customer Admin to change the billing information for the account.

### 6.1.1 Colorado.gov Homepage-Access Registered Services page



### 6.1.2 Registered Services Page-Access Account Management Page



### 6.1.3 Log into CDB (Customer Data Base) –Enter your username and password



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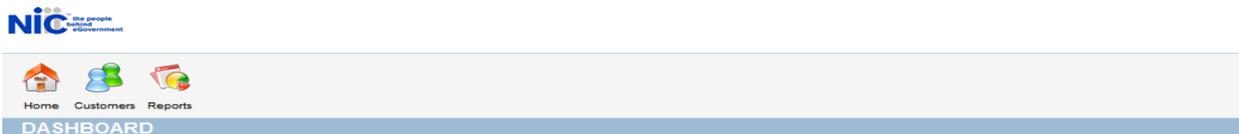
**Login to Your CDB Account**

Login:

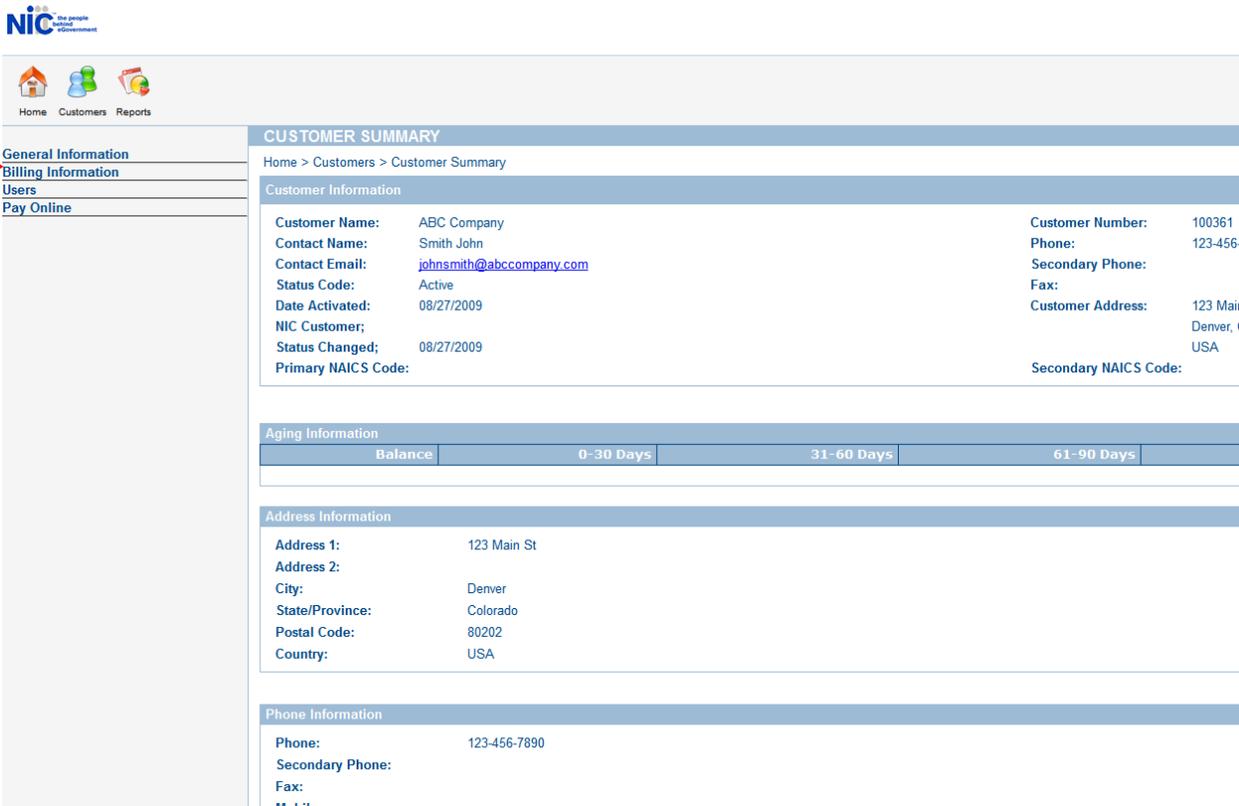
Password:

[Forgot my password](#)

### 6.1.4 Select Customer



### 6.1.5 Select Billing Information



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Home Customers Reports

**CUSTOMER SUMMARY**

Home > Customers > Customer Summary

**Customer Information**

Customer Name:	ABC Company	Customer Number:	100361
Contact Name:	Smith John	Phone:	123-456-
Contact Email:	<a href="mailto:johnsmith@abccompany.com">johnsmith@abccompany.com</a>	Secondary Phone:	
Status Code:	Active	Fax:	
Date Activated:	08/27/2009	Customer Address:	123 Main Denver, C USA
NIC Customer:		Secondary NAICS Code:	
Status Changed:	08/27/2009		
Primary NAICS Code:			

**Aging Information**

Balance	0-30 Days	31-60 Days	61-90 Days

**Address Information**

Address 1:	123 Main St
Address 2:	
City:	Denver
State/Province:	Colorado
Postal Code:	80202
Country:	USA

**Phone Information**

Phone:	123-456-7890
Secondary Phone:	
Fax:	
Mobile:	

**Navigation Menu:**

- General Information
- Billing Information**
- Users
- Pay Online

### 6.1.6 Select Modify Billing

**Colorado**

Home Customers Reports My Profile: [j.smith](#) Logout

**BILLING INFORMATION**  
Home > Customers > Customer Summary > Billing Information

**Customer Information** Modify Customer

Customer Name: ABC Company	Customer Number: 100361
Contact Name: Smith, John	Phone: 123-456-7890
Contact Email: <a href="mailto:johnsmith@abccompany.com">johnsmith@abccompany.com</a>	Secondary Phone:
Status Code: Active	Fax:
Date Activated: 09/27/2009	Customer Address: 123 Main St
NIC Customer:	Denver, CO 80202
Status Changed: 09/27/2009	USA
Primary NAICS Code:	Secondary NAICS Code:

**Billing Information** Modify Billing

Apply Minimum Billing: No  
Waive Service Fee: No  
Do Not Invoice: No  
Is Prepay: No  
Invoice Payment Terms: 20  
Invoice Template: Service By Day  
Option: Mailed Invoice  
Address: John Smith  
123 Main St  
Denver, CO 80202  
USA

Choose desired billing option and fill in the required information, once complete select the 'Submit' button.

**Colorado**

Home Customers Reports My Profile: [j.smith](#) Logout

**MODIFY BILLING INFORMATION**  
Home > Customers > Customer Summary > Billing Information > Modify Billing Information

**Customer Information**

Customer Name: ABC Company Customer Number: 100361

**Credit Card Option**

Credit Card:   
Card Expiration Date:  (mm/yyyy)  
Card Type: -- Card type --

**ACH Option (US Only)**

Routing Number:   
Account Number:   
Account Type: -- Account Type --  
Customer Type: -- Customer Type --  
Bank Name:

**Online Invoice Option**

Email:   Same as Main

**Mailed Invoice Option**

Customer Name: ABC Company  Same as Main  
First Name: John  
Last Name: Smith  
Address 1: 123 Main St  
Address 2:   
City: Denver  
State/Province: Colorado  
County: -- County --  
Postal Code: 80202  
Country: USA

**Submit**

## 7 Security Best Practices

### 7.1 SYSTEM MAINTENANCE

Maintain your systems with the most current security patches (aka Service Packs) from your system's vendor. This will close most of the known security holes. Limit the amount of services and applications you are running simultaneously. The more services running, the greater the risk of exposing the system to exploitation. Finally, remove any programs or applications not being used and defragment your hard drive on a regular basis to help your system's overall performance.

### 7.2 PASSWORD SECURITY

Never store password as plain text or write down on paper. Use encryption utilities if you have to store the password in a file for some reason. Do not share your password with your coworkers.